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Ontario Tourism Research Highlights

1. Tourism Performance - 1999 Year-to-date:

International Border-crossings to Ontario
In 1999, border-crossings from international destinations (U.S. and overseas) to Ontario were basically unchanged compared to 1998 (-0.1%), at 31.9 million, maintaining the record high level reached in 1998.

U.S. Border-crossings to Ontario
Following four years of strong growth of U.S. travel to Ontario - 6.4% on average per year - 1999 saw a slowdown of this trend; U.S. visitation to Ontario during 1999 was basically unchanged (-0.2%, at 30.1 million). For December 1999 (over December 1998), U.S. border-crossings to Ontario were down by 8.8%. This substantial decline of U.S. travel to Ontario in December may be explained by the arrival of the new millennium and individuals' preference to celebrate New Year's eve at home instead of travelling to international destinations.

It appears that U.S. travel to Ontario leveled off in 1999 following several years of strong growth. Some of the reasons for this upward trend are the strong U.S. dollar against the Canadian dollar (which remained unchanged in 1999 over 1998), the healthy U.S. economy, rising consumer confidence, and increased marketing efforts by Ontario and Canada.

Overseas Border-crossings to Ontario
While overseas travel to Ontario had been declining since May 1997, it jumped substantially in recent months (11.8% in October '99 and 18.4% in November '99). In December '99, this market dropped by 1.9%, possibly due to the arrival of the new millennium. For the full year of 1999, overseas border-crossings to Ontario was up by 1.3%, reflecting in part the beginning of the economic recovery in some of Ontario's overseas travel markets. A weak economy in Asia and some parts of Europe were responsible, in part, for the slowdown of this market.

Ontarians' Travel to International Destinations
Ontarians' travel to international destinations was on the decline since 1996 driven by the steady decline of travel to the U.S. However, in the second half of 1999, there has been a continuous increase. In December 1999, Ontarians' travel to the U.S. increased by 4.9%. This recent upward trend may be attributed to a stronger Canadian dollar vs. the U.S. dollar and pent-up demand for travel to the U.S. However, for the full year of 1999, Ontarians' travel to the U.S. went down by 2.0%, to 21.3 million.

On the other hand, Ontarians' travel to overseas countries has been growing since 1991. In spite of the weakening Canadian dollar against many other currencies, Ontarians' travel to overseas countries continued to increase in 1999. However, it appears that this trend is slowing down in recent months. Travel to overseas countries in December 1999 was up by 0.5%. For the full year of 1999, Ontarians' travel to overseas countries was down by 0.1%, to 2.2 million.

Domestic Travel in Ontario
Total domestic travel to Ontario during the first three quarters of 1999 was up by 4.0%, over the first three quarters of 1998, to 58.9 million. Travel by Ontarians in Ontario - which accounts for 95% of the

domestic travel and about 70% of total travel in Ontario - went up by 4.2%, while travel from Quebec was down by 24.7%, and travel from other Canadian provinces was up by 2.2%. Overall, all types of domestic travel (leisure, personal and visiting friends and relatives) were up, except for business travel, which dropped by 2.1%. With a stronger economy in Ontario and a weaker Canadian dollar vs. the U.S. dollar, Ontarians, as well as most Canadians, are staying closer to home at the expense of travel to the less affordable U.S.

While the performance of the first three quarters of 1999 was positive, domestic travel in the third quarter alone declined by 8.4%. This decline could be attributed to the following factors:

· The somewhat stronger Canadian dollar vs. the U.S. dollar (2% stronger) over the same period in 1998, combined with pent-up demand for travel to the U.S., resulted in a 10.8% increase in travel by Ontarians to the U.S. This was possibly at the expense of domestic travel.

· The Canadian Travel Price Index (TPI) showed a 5% increase in the average cost of trips between the third quarter of 1998 and the third quarter of 1999. This would make Canada less competitive.

Hotel Occupancy Rates
Hotel occupancy rates in Ontario dropped by 0.9%, to an occupancy rate of 69.4%, in 1999 over 1998. Ontario's hotel occupancy performance in 1999 was the highest in Ottawa (72.8%) and Metropolitan Toronto (73.1%). The average daily rate in Ontario increased by 9.0%, to $106.51 in 1999. The highest average daily rate was achieved in Metropolitan Toronto ($122.60). Daily room rates continued to increase in spite of the slight drop in occupancy rates across most Ontario's regions in 1999. The combination of strong demand and limited supply led to room rates growth. A 0.9% drop in occupancy rate coupled with a 9.0% increase in average daily rate, resulted in an 8.1% increase in revenues per available room. (Source: Pannell Kerr Forster Consulting Inc.)

Visitors' Enquiries to 1-800-ONTARIO and Travel Information Centres
Visitors' enquiries to the 1-800-ONTARIO line were down by 3.3% in 1999 over 1998.

Visitors to the Province of Ontario's Travel Information Centres declined by 6.0% in 1999 1998.

2. Tourism Performance - 1998:

International Border-crossings to Ontario
International (U.S. and overseas) border-crossings to Ontario increased by 6.4%, from 30.0 million in 1997, to 31.9 million in 1998, the highest volume of all time. Total international visitation to Ontario in 1998 reached 32.3 million. Unlike border-crossing data, total visitation includes visitors to Ontario who enter Canada through other provinces but does not includes international visitors to Canada who clear customs in Ontario but do not visit Ontario. Visitation data also does not include commuters and those who visit Ontario for educational purposes

U.S. border-crossings to Ontario increased by 7.8%, from 27.9 million in 1997, to 30.1 million in 1998, the highest level recorded todate. Overseas border-crossings to Ontario declined by 12.9%, from 2.0 million in 1997, to 1.8 million in 1998.

Ontarians' Travel to International Destinations
Travel from Ontario to international destinations (U.S. and overseas) declined by 11.3%, from 25.9 million in 1997 to 23.0 million in 1998. Border-crossings from Ontario to the U.S. declined by 12.7%, from 23.9 million in 1997 to 20.8 million in 1998. Border-crossings from Ontario to overseas countries increased by 4.5%, from 2.1 million in 1997 to 2.2 million in 1998.

Domestic Travel in Ontario
Travel by Ontario residents in Ontario increased - for the first time since 1991 - by 5.3%, to 70.3 million visitors in 1998. Most of this growth is attributed to the overnight market, which grew substantially by 14.4% over 1997, to 27.1 million visitors. Same-day visitation was up by 0.3%, to 43.3 million. Tourism

spending by Ontarians in Ontario was up by 12.3%, to $8.1 billion, in 1998.

Visitation by other Canadians in Ontario in 1998 increased by 17.6%, to 4.3 million, the highest visitation level since 1995. Overnight visitation alone increased by 14.0%, to 3.3 million, while same day visitation was up by 30.9%, to 1.0 million, in 1998. Tourism spending by other Canadians in Ontario was up by 13.8%, to $917 million, in 1998

Hotel Occupancy Rates
Hotel occupancy rates in Ontario increased by 3.1%, to an occupancy rate of 70.6%, in 1998, the highest rate since 1988. Ontario's hotel occupancy performance in 1998 was the highest in Ottawa (74.9%) and Metropolitan Toronto (74.0%). These annual occupancy rates of around 75% are considered close to full capacity in the hotel industry. The average daily rate in Ontario increased by 8.7%, to $98.10 in 1998. The highest average daily rate was achieved in Metropolitan Toronto ($113.09). Average daily room rates increased by substantially higher proportions than occupancy rates across all Ontario's regions in 1998. A 3.1% increase in occupancy rate coupled with an 8.7% increase in average daily rate resulted in 12.0% increase in revenues per available room. (Source: Pannell Kerr Forster Consulting Inc.)

Visitors' Enquiries to 1-800-ONTARIO and Travel Information Centres
Visitor enquiries to the 1-800-ONTARIO line were up by 3.1% in 1998 over 1997.

Visitors to the Province of Ontario's Travel Information Centres were up by 11.9% in 1998 over 1997.

3. State of Tourism - 1997:

Ontario has Canada's largest tourism industry accounting for ***37% of national tourism revenues and 44% of its visitors***. It is the predominant gateway into Canada.

Ontario's tourism industry provided 412,000 direct, indirect and induced jobs, representing almost ***8% of Ontario's employment***.

In 1997, ***101.2 million visitors*** accounted for ***$14.1 billion in tourism expenditures*** in Ontario.

Tourism was ***Ontario's 6th largest export industry***, bringing into the province $6.1 billion in foreign exchange from outside Canada.

4. Trends and Historical Information:

Total ***number of visitors to Ontario*** between 1980-1998 declined by 0.8%, from 108.0 million in 1980, to 107.2 million in 1998. Over this period, the domestic market declined substantially while the international market, especially the overseas market, performed positively.

Ontarians' travel in Ontario was down by 5.5%, from 74.4 million, in 1980, to 70.3 million in 1998, and other Canadians' travel was down by 8.7%, from 4.7 million in 1980, to 4.3 million in 1998. While domestic travel in Ontario was down during this period, Ontarians' travel to international destinations jumped by 41.4%.

Between 1980-1998, ***U.S. travel*** was up by 10.4%, from 27.5 million to 30.4 million. While 1980 and 1981 were high travel years for Americans (to Ontario) because of low gasoline prices in Ontario, U.S. travel levels to Ontario were lower during the following years until 1996. In recent years, however, U.S. travel to Ontario has gone up due primarily to the strong U.S. dollar, healthy U.S. economy, high consumer confidence and increased marketing efforts.

Overseas travel to Ontario was up by 54.7%, from 1.4 million in 1980, to 2.2 million in 1998. Ontario's fastest growing travel market, steadily increased over the years, except for short declines seen during the middle 80s and early 90s due to world recessions. There was a 17.0% decline in overseas visitation to

Ontario in 1998 over 1997, the first decline in this travel market since 1991. As mentioned earlier, this decline is attributed to the weak economy in Asia and some parts of Europe.

In spite of the decline in total visitation to Ontario, total ***tourism expenditures*** between 1980-1998 increased by 25% in real dollars. This increase is attributed primarily to the increased share of higher yield international visitors.

5. Tourism Forecasting (2000-2003)

According to the Ontario Ministry of Tourism's Forecasting Model, revised in January 2000, Ontario's tourism sector will level off in either 1999 or 2000, following strong gains in previous years. Although the market will remain robust, the forecast is for a more subdued growth. Total number of visitors to Ontario in 2000 is forecast to decrease by 0.8% over 1999, to 117.4 million visitors. While international travel to Ontario is predicted to strengthen, the prospects for domestic travel are negative.

Total ***visitation from the U.S.*** is expected to grow by 0.7% in 2000, mainly due to the strong U.S. economy, as well as the low Canadian dollar. ***Visitation from overseas countries*** is expected to remain unchanged, while the economy in some of Ontario's overseas travel markets, i.e., France and Germany, is strong and in other markets, i.e., Japan and the U.K., it remains weak. A major cause for the forecasted weakness of overseas travel to Ontario is the recent surge in Ontario's tourism prices, as well as the gains of the Canadian dollar against a number of overseas currencies.

Travel by Ontarians in Ontario in 2000 is forecasted to decrease by 1.4%, following growth in both 1998 and 1999. The strong disposable income gains and higher tourism prices in Ontario may be behind increased Ontarians' outbound travel at the expense of travel within Ontario. ***Travel by other Canadians*** to Ontario in 2000 is forecasted to increase by 0.1%.

Total travel in Ontario (by all visitors) is expected to drop by 1.7% in 2001 and grow relatively slowly in subsequent years - by 1.5% per year in both 2002 and 2003.

Sources:

Statistics Canada, International Travel Survey and Canadian Travel Survey
Pannell Kerr Forster Consulting Inc.
Ontario Ministry of Tourism, Tourism Forecasting Model
Ontario Ministry of Tourism, Tourism Regional Economic Impact Model (TREIM)

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ONTARIO

Ministry of Tourism
March 2000

A. CURRENT PERFORMANCE INDICATORS:

A.1. INTERNATIONAL VISITORS TO ONTARIO (Border-crossings)[1]

A.1.1. Total Border-crossings (same-day and overnight):

Origin:	December 1999	% Change from previous year (December 1998):	Full Year 1999	% Change from previous year (1998):	Full Year 1998	% Change from previous year (1997):
From International Destinations	**2,000,319**	**-8.8%**	**31,883,483**	**-0.1%**	**31,912,137**	**+6.4%**
From the United States:	**1,900,717**	**-9.1%**	**30,080,159**	**-0.2%**	**30,132,348**	**+7.8%**
From Overseas:	**99,602**	**-1.9%**	**1,803,324**	**+1.3%**	**1,779,789**	**-12.9%**
UK	**23,612**	**-3.2%**	**403,610**	**+1.1%**	**399,167**	**-4.2%**
Japan	**5,501**	**-9.9%**	**186,181**	**+10.5%**	**168,507**	**-30.4%**
Germany	**6,983**	**+0.2%**	**165,701**	**+1.0%**	**164,131**	**-10.5%**
France	**3,984**	**-12.5%**	**126,815**	**-6.9%**	**136,216**	**-15.3%**
Italy	**5,063**	**-1.2%**	**87,249**	**+9.2%**	**79,921**	**-0.7%**
Hong Kong	**2,608**	**-17.1%**	**44,735**	**-14.8%**	**52,500**	**-3.3%**
Netherlands	**2,555**	**+11.6%**	**48,762**	**-1.9%**	**49,702**	**-6.6%**
Australia	**3,077**	**-5.4%**	**40,144**	**-0.7%**	**40,426**	**-11.3%**
Korea	**2,169**	**+22.1%**	**40,580**	**+43.3%**	**28,321**	**-64.8%**
Taiwan	**533**	**-31.0%**	**12,392**	**-18.0%**	**15,120**	**-36.9%**

Source: Statistics Canada, International Travel Section

1. International border-crossings statistics are not total international visitation and do not include visitors to Ontario, who enter Canada through other provinces. However, unlike visitation data, international border-crossings include international visitors to Canada who clear customs in Ontario but do not visit Ontario, as well as commuters and those who visit Ontario for educational purposes

A.1.2. Overnight Border-crossings Only:

Origin:	December 1999	% Change from previous year (1998):	Full Year 1999	% Change from previous year (1998):	Full Year 1998	% Change from previous year (1997):
From International Destinations	**518,119**	**+1.4%**	**9,602,612**	**+0.5%**	**9,564,439**	**+7.5%**
From the United States:	**423,047**	**+1.2%**	**7,940,370**	**-0.1%**	**7,959,155**	**+12.1%**
Automobile	**238,464**	**-5.9%**	**5,367,631**	**-1.5%**	**5,449,358**	**+13.6%**
Non-Automobile	**184,583**	**+12.2%**	**2,572,739**	**+3.1%**	**2,509,797**	**+8.9%**
From Overseas:	**95,072**	**+2.2%**	**1,662,242**	**+3.5%**	**1,605,284**	**- 10.5%**

Source: Statistics Canada, International Travel Section

A.2. ONTARIANS TRAVELLING TO INTERNATIONAL DESTINATIONS(Border-crossings)

Total Border-crossings (same-day and overnight)

Destination:	December 1999	% Change from previous year (December 1998):	Full Year 1999	% Change from previous year (1998):	Full Year 1998:	% Change from previous year (1997):
To International Destinations	**1,792,181**	**+4.5%**	**23,421,560**	**+1.8%**	**23,012,330**	**-11.3%**
To The United States:	**1,640,959**	**+4.9%**	**21,258,959**	**+2.0%**	**20,847,361**	**-12.7%**
To Overseas	**151,222**	**+0.5%**	**2,162,601**	**-0.1%**	**2,164,969**	**+4.5%**

Source: Statistics Canada, International Travel Section

A.3 CANADIANS TRAVELLING IN ONTARIO

A.3.1 Total Visitors (same-day and overnight)

Origin:	First Three Quarters 1999	% Change from previous year:	Full Year 1998:	% Change from previous year (1997):
Total Canadians	58,895,000	+4.0%	74,602,000	+6.0%
Ontarians	55,737,000	+4.2%	70,326,000	+5.3%
Quebec residents	1,958,000	-2.2%	2,608,000	+24.7%
Other Canadians	1,200,000	+2.2%	1,668,000	+8.0%

Source: Statistics Canada, Canadian Travel Survey

A.3.2 Overnight Visitors Only

Origin:	First Three Quarters 1999	% Change from previous year:	Full Year 1998:	% Change from previous year (1997):
Total Canadians	24,527,000	+4.2%	30,317,000	+14.4%
Ontarians	22,043,000	+4.4%	27,054,000	+14.4%
Quebec residents	1,362,000	+3.3%	1,692,000	+20.9%
Other Canadians	1,122,000	+1.0%	1,571,000	+7.5%

Source: Statistics Canada, Canadian Travel Survey

A.4 HOTEL OCCUPANCY RATES IN ONTARIO

Report of Rooms Operations, by Location, 1999 (full year)

Location		Occupancy Rates			Average Daily Rate			Revenue Per Available Room*		
Region	City	1999	1998	Var.	1999	1998	Var.	1999	1998	Var.
Metro Toronto		73.1%	73.7%	-0.7 %	$122.60	$112.44	9.0%	$89.67	$82.82	8.3%
Eastern Ontario		71.2%	72.3%	-1.5%	$102.83	$92.27	11.4%	$73.24	$66.70	9.8%
	Ottawa	72.8%	74.0%	-1.6%	$108.34	$97.15	11.5%	$78.91	$71.92	9.7%
Southwestern Ontario		61.6%	66.8%	-7.7%	$86.97	$78.70	10.5%	$53.59	$52.54	2.0%
Festival Country		63.6%	63.3%	0.6%	$92.53	$85.90	7.7%	$58.89	$54.35	8.4%
	Niagara Falls	61.8%	62.1%	-0.5%	$106.04	$99.06	7.0%	$65.52	$61.54	6.5%
Georgian Lakelands		65.9%	64.1%	2.9%	$89.50	$83.99	6.6%	$58.98	$53.81	9.6%
Central Ontario		65.5%	65.6%	-0.2%	$79.75	$71.94	10.9%	$52.26	$47.22	10.7%
Northern Ontario		66.0%	63.8%	3.4%	$75.23	$71.20	5.7%	$49.62	$45.43	9.2%
Total Ontario		69.4%	70.0%	-0.9%	$106.51	$97.70	9.0%	$73.88	$68.35	8.1%

* Revenue Per Available Room = average occupancy rate * average daily rate
Source: Trends in the Canadian Hotel Industry, PANNELL KERR FORSTER CONSULTING INC.

A.5. TRAVEL INFORMATION ENQUIRIES
(% Change from previous year)

Activity	Full Year 1999 (% change from 1998)	Full Year 1998 (% change from 1997)
Enquiries to 1-800-ONTARIO	**-3.3%**	**+3.1%**
Visitors to Ontario's Travel Information Centres	**-6.0%**	**+11.9%**

Source: Ontario Ministry of Tourism

B. Trends and Historical Statistics

B.1. THE STATE OF TOURISM IN ONTARIO, 1997[1]

Ontario has Canada's largest tourism industry accounting for 37% of national tourism revenues and 44% of its visitors. It is the predominant gateway into Canada.

Tourism is an important industry within the Ontario economy, ranking 9th in its contribution ($6.9 billion) to provincial GDP.

Ontario's tourism industry is extremely diverse. Its businesses are predominantly small to medium-sized. It has more than 36,000 businesses in food and beverage, accommodation and amusement; more than 43,000 businesses in the above sectors plus transportation and travel services; and almost 88,000 in all tourism-related businesses including all the above plus car rental and tourism-related retail.

Ontarians are major consumers of tourism products and services. Spending on tourism accounts for about 7.5% of total household expenditures.

Ontario's tourism industry is an important generator of jobs, tax revenues and export dollars. In 1997, the tourism industry:

- provided 242,000 direct jobs and an additional 170,000 indirect and induced jobs, representing almost 8% of Ontario's total employment.
- generated $5.9 billion in total taxes, of which $2.1 billion was provincial tax revenue.
- accounted for $14.1 billion in tourism expenditures, spent by 101.2 million visitors.

Tourism was Ontario's 6th largest export industry bringing into the province $6.1 billion in foreign exchange from outside Canada.

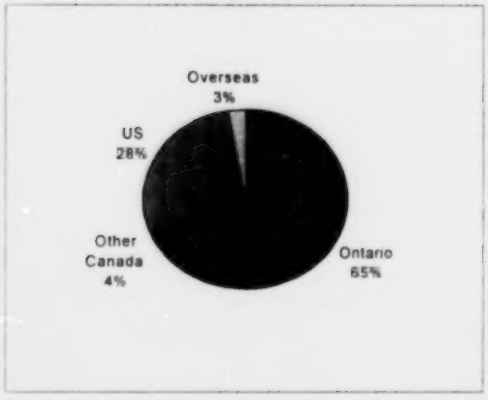
1. Preliminary, subject to change due to future revision of travel statistics by Statistics Canada and Ontario Ministry of Tourism's economic impact model (TREIM).

ONTARIO

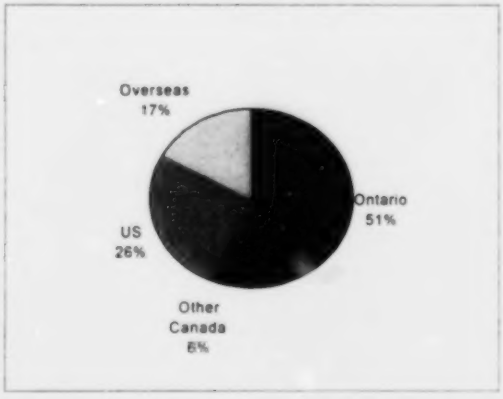
Ministry of Tourism
March 2000

TRAVEL IN ONTARIO - 1997*

Visitors by Origin - Ontario
101.2 million



Tourism Spending in Ontario
$14.1 billion



*Subject to change due to future revision of travel statistics by Statistics Canada and MTOUR's economic impact model (TREIM)
Sources: Statistics Canada, 1997 International Travel Survey
Statistics Canada, 1997 Canadian Travel Survey
Ontario Ministry of Tourism

B.2. VISITORS TO ONTARIO, BY ORIGIN, 1980-1998

B.2.1. Visitors to Ontario from Overseas Countries, 1980-1998: (In 000's)[2]

Year:	Same Day:	Overnight:	Total:
1980	309	1,101	1,410
1981	288	1,132	1,420
1982	248	1,034	1,282
1983	193	907	1,100
1984	207	954	1,161
1985	203	914	1,117
1986	247	1,101	1,348
1987	352	1,351	1,703
1988	373	1,613	1,986
1989	341	1,718	2,059
1990	356	1,751	2,107
1991	315	1,482	1,797
1992	361	1,530	1,891
1993	392	1,580	1,972
1994	380	1,803	2,183
1995	399	1,928	2,326
1996	393	2,188	2,581
1997	376	2,251	2,627
1998	301	1,880	2,181

Source: Statistics Canada, International Travel Survey

2 Preliminary, subject to change

B.2.2. Visitors to Ontario from the U.S., 1980-1998: (In 000's)[3]

Year:	Same Day:	Overnight:	Total:
1980	21,117	6,405	27,522
1981	22,368	6,285	28,653
1982	16,603	6,228	22,831
1983	16,578	6,338	22,916
1984	16,543	6,400	22,943
1985	17,097	6,421	23,518
1986	17,728	6,783	24,511
1987	18,495	7,193	25,688
1988	18,121	7,016	25,137
1989	17,175	6,630	23,805
1990	16,726	6,678	23,404
1991	16,099	6,586	22,685
1992	15,348	6,414	21,762
1993	15,204	6,534	21,738
1994	16,840	6,879	23,719
1995	18,700	6,895	25,595
1996	19,721	6,788	26,509
1997	21,157	7,008	28,165
1998	22,499	7,878	30,377

Source: Statistics Canada, International Travel Survey

3 Preliminary, subject to revision

B.2.3. Ontarians Visiting Ontario, 1980-1998[4]: (In 000's)

Year:	Same Day:	Overnight:	Total:
1980	44,556	29,827	74,383
1981	43,616	29,266	72,882
1982	37,632	29,270	66,902
1983	37,793	28,945	66,738
1984	37,787	28,999	66,786
1985	39,918	31,386	71,304
1986	50,928	32,301	83,229
1987	53,060	32,709	85,769
1988	66,705	33,939	100,644
1989	49,740	31,854	81,594
1990	57,450	35,527	92,968
1991	57,749	38,925	96,674
1992	57,848	31,925	89,773
1993	55,717	30,802	6,519
1994	53,207	28,487	81,694
1995	51,468	28,342	79,810
1996	46,277	27,024	73,301
1997	43,122	23,639	66,761
1998	43,271	27,054	70,325

Sources: Statistics Canada, Canadian Travel Survey,
Ontario Ministry of Tourism

4 Includes trips of 40km and over

B.2.4. Visitors to Ontario from Other Canadian Provinces, 1980-1998[5]: (In 000's)

Year:	Same Day:	Overnight:	Total:
1980	1,054	3,629	4,683
1981	1,039	3,605	4,644
1982	894	3,055	3,949
1983	867	3,035	3,902
1984	558	2,937	3,495
1985	966	3,619	4,585
1986	1,373	4,285	5,658
1987	1,307	4,276	5,583
1988	2,162	4,411	6,573
1989	1,770	4,315	6,085
1990	1,377	4,204	5,581
1991	1,351	3,759	5,110
1992	1,323	3,347	4,670
1993	1,320	3,217	4,537
1994	1,330	3,275	4,605
1995	1,249	3,224	4,473
1996	954	2,944	3,898
1997	774	2,863	3,637
1998	1,013	3,264	4,277

Source: Statistics Canada, Canadian Travel Survey,
Ontario Ministry of Tourism

5 Includes trips of 40 km and over

ONTARIO

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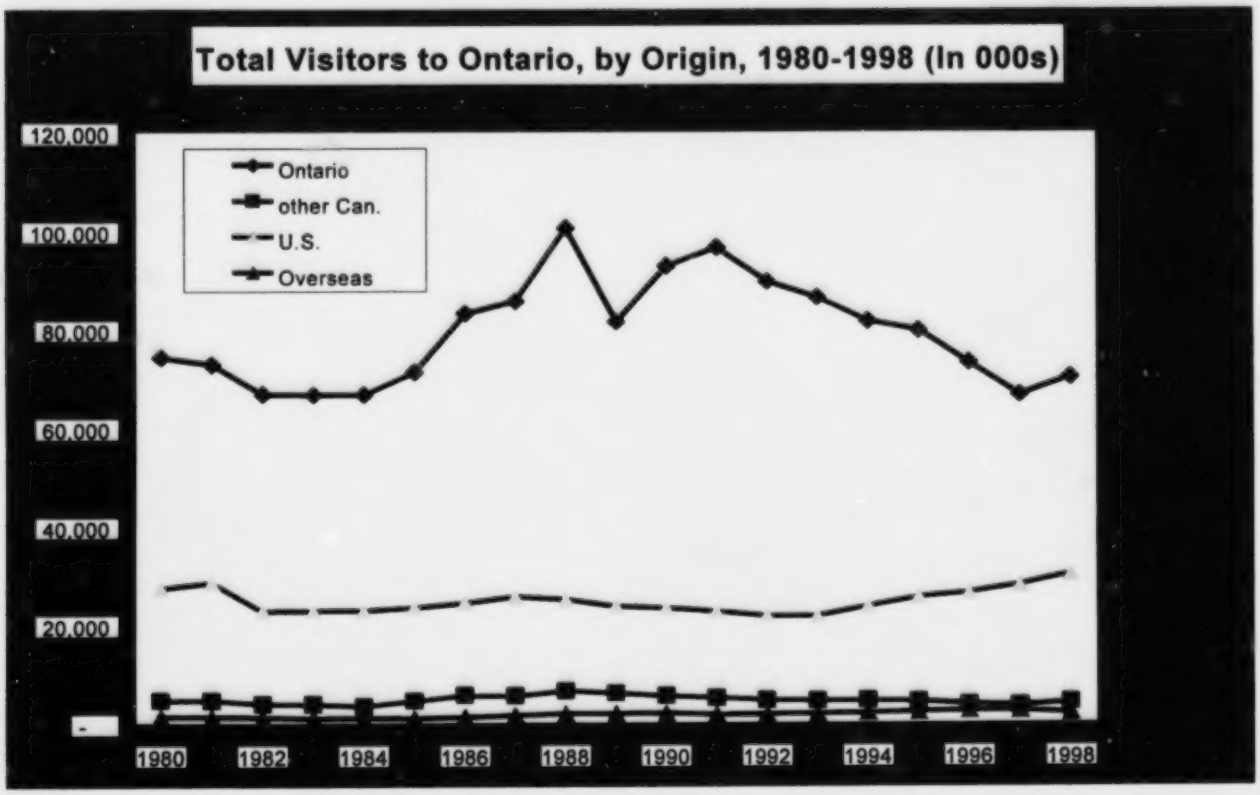
March 2000



B.3. TOTAL TRAVEL EXPENDITURES IN ONTARIO, 1980-1998:[6]

B.3.1. Expenditures by Origin of Visitors, 1980-1998 (In millions of current $)

Year:	Overseas:	USA:	Ontario[7]:	Other Canada:	Total:
1980	$535	$1,027	$2,819	$542	$4,923
1981	$559	$1,164	$3,241	$557	$5,521
1982	$584	$1,131	$3,610	$488	$5,813
1983	$509	$1,281	$3,891	$487	$6,168
1984	$544	$1,453	$4,268	$471	$6,736
1985	$573	$1,637	$4,847	$594	$7,651
1986	$758	$1,844	$5,324	$722	$8,648
1987	$949	$1,948	$5,881	$776	$9,554
1988	$1,113	$1,836	$6,952	$883	$10,784
1989	$1,246	$1,831	$6,374	$927	$10,378
1990	$1,407	$2,119	$7,299	$965	$11,790
1991	$1,217	$2,173	$7,515	$900	$11,805
1992	$1,293	$2,173	$6,592	$827	$10,885
1993	$1,344	$2,388	$6,501	$826	$11,059
1994	$1,612	$2,843	$6,438	$865	$11,758
1995	$1,781	$3,070	$6,476	$868	$12,195
1996	$2,072	$3,404	$7,075	$775	$13,326
1997	$2,407	$3,709	$7,212	$806	$14,134
1998	$2,121	$4,735	$8,101	$917	$15,874

Sources: Statistics Canada, International Travel Survey, Canadian Travel Survey,
Ontario Ministry of Tourism

B.3.2 Expenditures by Origin of Visitors, 1980-1998 (In millions of 1992 $)

Year:	Total:	Year:	Total:
1980	$10,620	1990	$12,459
1981	$10,504	1991	$11,888
1982	$9,640	1992	$10,885
1983	$9,641	1993	$10,808
1984	$10,031	1994	$11,310
1985	$10,802	1995	$11,223
1986	$11,316	1996	$11,930
1987	$12,109	1997	$12,145
1988	$13,376	1998	$13,298
1989	$11,966		

Sources: Statistics Canada, International Travel Survey, Canadian Travel Survey,
Ontario Ministry of Tourism

6 Spending data are preliminary and subject to change due to future revision by Statistics Canada and MTOUR.

7 Includes Canadian carrier fares purchased by Ontarians to travel to destinations outside Ontario.

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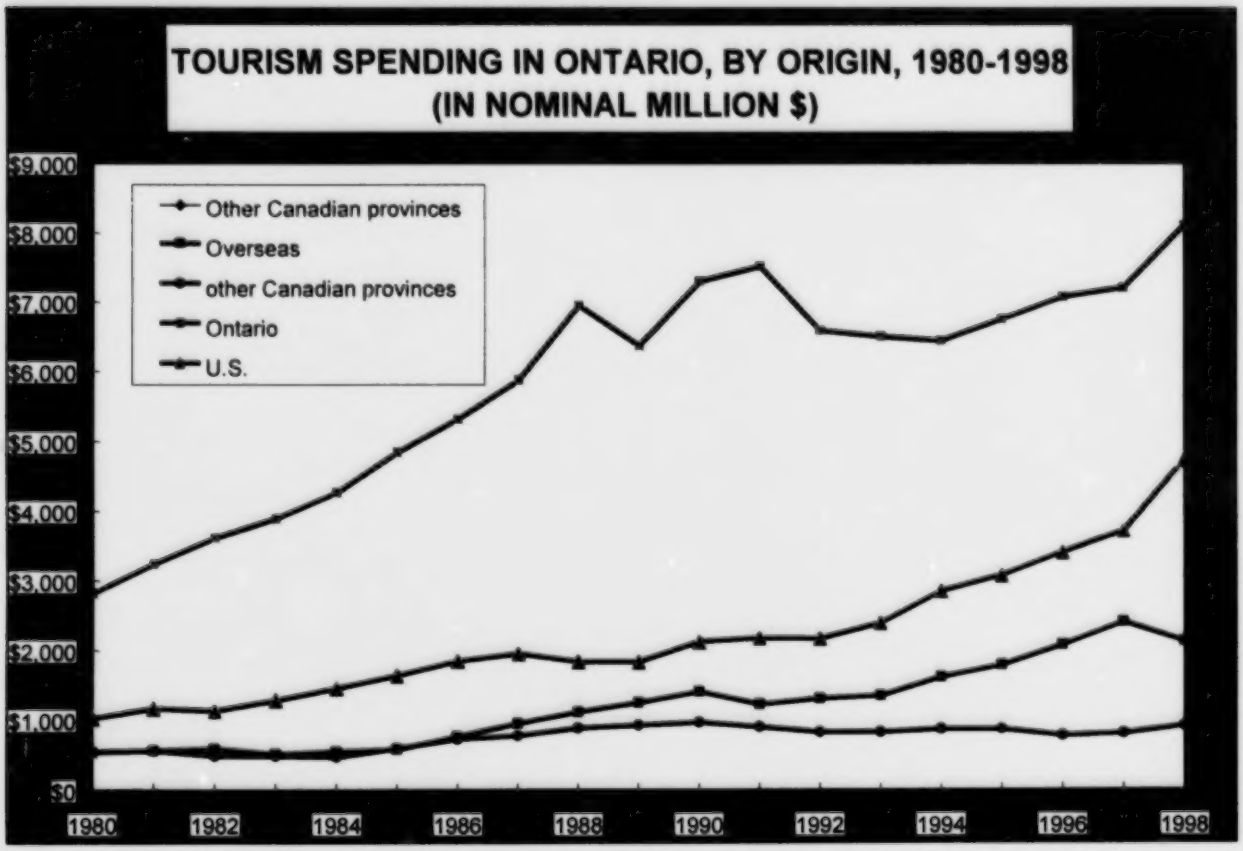

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B.4. VISITORS TO ONTARIO, BY ORIGIN AND, BY REGION OF DESTINATION/VISIT IN ONTARIO, 1996 (In 000's)

Region of destination/visit in Ontario	From Ontario	From USA	From Other Provinces	From Other Countries	Total
Southwestern Ontario	**10,964**	**1,132**	**128**	**129**	**12,353**
Festival Country	**12,677**	**7,605**	**220**	**915**	**21,417**
Georgian Lakelands	**9,005**	**268**	**60**	**119**	**9,452**
Metropolitan Toronto	**13,454**	**3,798**	**1,359**	**1,614**	**20,225**
Getaway Country	**10,155**	**432**	**117**	**127**	**10,831**
Ontario East	**10,756**	**1,964**	**1,715**	**583**	**15,018**
Near North	**1,098**	**74**	**34**	**41**	**1,247**
Rainbow Country	**2,310**	**89**	**28**	**54**	**2,481**
Algoma Country	**808**	**803**	**37**	**37**	**1,685**
James Bay Frontier	**1,266**	**54**	**47**	**5**	**1,372**
North of Superior	**649**	**381**	**72**	**38**	**1,140**
Sunset Country	**481**	**637**	**315**	**4**	**1,437**
Region Not Stated	**464**	**9**	**91**	**13**	**577**
Total Province:	**73,301**	**26,509**	**3,898**	**2,581**	**106,289**

SOURCES:

Ontario and Other Provinces:

Statistics Canada, 1996 Canadian Travel Survey

U.S. and Other Countries:

Statistics Canada, 1996 International Travel Survey

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B.5. TOURISM EXPENDITURES IN ONTARIO, BY ORIGIN OF VISITORS AND, BY REGION OF VISIT, 1996 (In millions of current $)

Region of visit in Ontario	From Ontario	From USA	From Other Provinces	From Other Countries	Total
Southwestern Ontario	$662.3	$741.0	$36.1	$45.4	$1,484.9
Festival Country	$1,129.9	$549.5	$46.1	$244.9	$1,970.4
Georgian Lakelands	$625.9	$47.2	$12.5	$41.0	$726.6
Metropolitan Toronto	$1,883.5	$1,301.1	$417.8	$1,352.5	$4,954.9
Getaway Country	$827.1	$88.7	$19.7	$72.4	$1,007.8
Ontario East	$1,200.1	$287.5	$178.8	$262.9	$1,929.3
Near North	$97.1	$24.8	$3.8	$12.6	$138.3
Rainbow Country	$186.1	$25.3	$3.6	$13.3	$228.3
Algoma Country	$85.9	$76.0	$3.8	$9.0	$174.7
James Bay Frontier	$122.7	$17.8	$4.2	$2.2	$146.9
North of Superior	$149.1	$47.5	$16.8	$7.6	$221.0
Sunset Country	$84.2	$141.9	$20.2	$2.5	$248.8
Region Not Stated	$20.5	$1.6	$11.4	$3.7	$37.2
Crew Spending[8]		$54.7		$2.1	$56.8
Total Province:	$7,074.4	$3,404.6	$774.7	$2,072.1	$13,325.8

SOURCE:

Ontario and Other Provinces:

Statistics Canada, I996 Canadian Travel Survey

U.S. and Other Countries:

Statistics Canada, I996 International Travel Survey

8 Spending by persons engaged in the operation of a transport, i.e., air, sea, truck, etc.

B.6. ECONOMIC IMPACT OF TOURISM IN ONTARIO

B.6.1. Economic Impact Of Tourism In Ontario, 1994-1997 (In millions of current $)

	1994	1996	1997 [9]
Initial Tourism Spending	$11,759	$13,326	$14,134
Gross Domestic Product:			
Total	$12,507	$14,272	$15,138
Direct	$5,694	$6,487	$6,881
Labour Income:			
Total	$8,133	$9,286	$9,849
Direct	$4,054	$4,604	$4,884
Output/Sales:			
Total	$25,508	$29,028	$30,788
Direct	$11,759	$13,326	$14,134
Employment - # of Jobs:			
Total	380,155	400,388	412,294
Direct	226,951	235,368	242,367
Employment - # of person-years:			
Total	N/A	345,324	355,593
Direct	N/A	190,898	196,576
Taxes (Total):			
Federal	$2,274	$2,609	$2,767
Provincial	$1,774	$2,010	$2,132
Municipal	$813	$931	$988
Taxes (Direct):	$2,921	$3,357	
Federal	$1,303	$1,464	$1,585
Provincial	$1,153	$1,298	$1,377
Municipal	$495	$565	$600

Sources: Statistics Canada, Canadian Travel Survey & International Travel Survey
Ontario Ministry of Tourism, Tourism Regional Economic Impact Model (TREIM)

9 1997 spending data are preliminary and subject to change due to future revision by Statistics Canada.

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B.8 Map of Ontario, by Tourism Region

B.6.2. 1996 Economic Impact of Tourism in Ontario, By Region (In 000's)

	Southwestern Ontario	Festival Country	Georgian Lakelands	Metro Toronto	Central Ontario	Ontario East
Initial Expenditure	$1,488,884	$1,977,017	$730,207	$5,019,957	$1,011,188	$1,936,987
Gross Domestic Product						
Direct Impact	$689,010	$1,007,828	$313,068	$2,616,717	$492,116	$886,247
Indirect & Induced Impact	$847,724	$1,320,076	$360,631	$3,052,001	$795,404	$932,680
Total Impact	$1,536,734	$2,327,904	$673,700	$5,668,719	$1,287,519	$1,818,927
Wages & Salaries						
Direct Impact	$474,964	$709,500	$221,325	$1,869,158	$349,825	$634,776
Indirect & Induced Impact	$500,174	$793,010	$207,535	$1,868,560	$473,859	$561,681
Total Impact	$975,138	$1,502,509	$428,860	$3,737,719	$823,683	$1,196,458
Employment (Jobs)						
Direct Impact	31,746.6	38,962.0	13,915.4	75,808.2	16,035.9	34,623.9
Indirect & Induced Impact	19,895.7	28,939.9	8,401.5	59,249.2	15,332.8	21,412.4
Total Impact	51,642.3	67,901.9	22,316.9	135,057.4	31,368.6	56,036.3
Industry Output						
Direct & Indirect	$2,241,797	$3,259,684	$964,641	$7,815,692	$1,767,832	$2,601,791
Induced Impact	$959,727	$1,576,250	$400,026	$3,525,250	$962,667	$1,020,790
Total Impact	$3,201,524	$4,835,934	$1,364,667	$11,340,942	$2,730,499	$3,622,581
Direct Taxes						
Federal	$153,869	$229,800	$72,480	$600,533	$118,297	$206,513
Provincial	$140,470	$196,735	$73,429	$474,284	$112,561	$187,956
Municipal	$49,910	$78,592	$28,961	$254,527	$29,203	$86,182
Total	$344,249	$505,127	$174,870	$1,329,344	$260,061	$480,651
Total Taxes						
Federal	$267,447	$414,445	$119,053	$1,061,434	$235,614	$335,796
Provincial	$214,376	$314,481	$104,213	$763,438	$185,081	$273,215
Municipal	$85,954	$136,164	$44,751	$406,538	$62,985	$136,742
Total	$567,776	$865,090	$268,017	$2,231,410	$483,680	$745,753

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1996 Economic Impact of Tourism in Ontario, By Region (In 000's) (Continued)

	Almanguin Nipissing	Rainbow Country	Algoma Country	James Bay Frontier	North of Superior	Sunset Country
Initial Expenditure	$138,860	$229,180	$175,133	$147,521	$221,718	$249,413
Gross Domestic Product						
Direct Impact	$55,206	$87,539	$78,153	$54,660	$103,718	$102,941
Indirect & Induced Impact	$55,026	$100,707	$73,244	$65,641	$105,071	$76,927
Total Impact	$110,233	$188,246	$151,397	$120,302	$208,789	$179,868
Wages & Salaries						
Direct Impact	$39,663	$62,657	$56,116	$39,530	$74,051	$72,838
Indirect & Induced Impact	$31,750	$58,093	$43,235	$36,942	$61,190	$45,223
Total Impact	$71,414	$120,750	$99,351	$76,472	$135,241	$118,061
Employment (Jobs)						
Direct Impact	3,069.5	4,544.2	4,459.9	2,898.5	4,148.0	5,155.9
Indirect & Induced Impact	1,421.0	2,447.7	1,904.7	1,552.1	2,355.8	2,106.8
Total Impact	4,490.5	6,992.0	6,364.6	4,450.6	6,503.8	7,262.7
Industry Output						
Direct & Indirect	$162,227	$278,535	$218,914	$178,752	$307,222	$275,509
Induced Impact	$58,322	$110,557	$79,160	$72,705	$115,151	$74,491
Total Impact	$220,549	$389,092	$298,074	$251,457	$422,373	$350,000
Direct Taxes						
Federal	$13,383	$21,094	$17,730	$13,356	$23,925	$23,026
Provincial	$15,280	$22,731	$16,294	$14,521	$21,824	$21,822
Municipal	$4,227	$5,548	$6,920	$4,143	$7,663	$9,506
Total	$32,890	$49,373	$40,944	$32,020	$53,412	$54,354
Total Taxes						
Federal	$20,491	$34,243	$27,268	$21,779	$38,098	$32,867
Provincial	$20,125	$31,511	$22,828	$20,123	$31,383	$28,886
Municipal	$6,496	$9,549	$9,972	$6,755	$12,433	$12,973
Total	$47,112	$75,302	$60,068	$48,657	$81,913	$74,726

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B.7. NUMBER OF ACTIVE ESTABLISHMENTS (BUSINESSES) IN ONTARIO, BY EMPLOYMENT SIZE IN TOURISM-RELATED SECTORS, DECEMBER, 1998

	Number of Employees										
Industry	Total	0	At Least 1	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+
Food	29,802	7,637	22,165	7,832	4,608	4,356	3,963	1,113	225	51	17
% of Total Food	100.0%	25.6%	74.4%	26.3%	15.5%	14.6%	13.3%	3.7%	0.8%	0.2%	0.1%
Accommodation	4,651	1,666	2,985	1,397	509	386	377	151	97	56	12
% of Total Accommodation	100.0%	35.8%	64.2%	30.0%	10.9%	8.3%	8.1%	3.2%	2.1%	1.2%	0.3%
Amusement	9,333	4,522	4,811	2,388	777	704	603	163	92	54	30
% of Total Amusement	100.0%	48.5%	51.5%	25.6%	8.3%	7.5%	6.5%	1.7%	1.0%	0.6%	0.3%
Transportation	6,917	3,777	3,140	1,749	458	330	285	128	117	50	23
% of Total Transportation	100.0%	54.6%	45.4%	25.3%	6.6%	4.8%	4.1%	1.9%	1.7%	0.7%	0.3%
Travel Services	2,490	626	1,864	1,093	424	211	93	22	15	5	1
% of Total Travel Services	100.0%	25.1%	74.9%	43.9%	17.0%	8.5%	3.7%	0.9%	0.6%	0.2%	0.0%
Car Rental	1,636	896	740	359	167	114	67	17	12	4	0
% of Total Car Rental	100.0%	54.8%	45.2%	21.9%	10.2%	7.0%	4.1%	1.0%	0.7%	0.2%	0.0%
Retail (tourism)	50,052	18,201	31,851	17,764	7,460	4,067	1,688	482	295	60	35
% of Total Retail	100.0%	36.4%	63.6%	35.5%	14.9%	8.1%	3.4%	1.0%	0.6%	0.1%	0.1%
Total Tourism	104,881	37,325	67,556	32,582	14,403	10,168	7,076	2,076	853	280	118
% of Total Tourism	100.0%	35.6%	64.4%	31.1%	13.7%	9.7%	6.7%	2.0%	0.8%	0.3%	0.1%
Total Economy	607,573	284,813	322,760	181,762	55,698	39,487	28,786	9,377	4,585	2,105	960
% of Total Economy	100.0%	46.9%	53.1%	29.9%	9.2%	6.5%	4.7%	1.5%	0.8%	0.3%	0.2%

* Owner-operated establishments with no paid employees.
Source: Statistics Canada, Business Register Division

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C. TRAVEL FORECAST, BY ORIGIN, 2000-2003:

C.1. Forecast Number of Visitors in/to Ontario (in 000s)

Origin:	2000	2001	2002	2003
Ontario	**79,705**	**78,770**	**80,012**	**81,290**
% change from previous year	-1.4%	-1.2%	1.6%	1.6%
Other Canadian Provinces	**4,519**	**4,410**	**4,569**	**4,761**
% change from previous year	0.1%	-2.4%	3.6%	4.2%
U.S.	**31,034**	**30,021**	**30,241**	**30,474**
% change from previous year	0.7%	-3.3%	0.7%	0.8%
Overseas	**2,149**	**2,195**	**2,252**	**2,305**
% change from previous year	0.0%	2.1%	2.6%	2.4%
Total	**117,407**	**115,397**	**117,074**	**118,830**
% change from previous year	-0.8%	-1.7%	1.5%	1.5%

Source: Ministry of Tourism, Tourism Forecasting Model

C.2. Forecast Tourism Spending in Ontario (in $million)[1]

Origin:	2000	2001	2002	2003
Ontario	**5,922**	**6,072**	**6,318**	**6,562**
% change from previous year	7.6%	2.5%	4.0%	3.9%
Other Canadian Provinces	**939**	**961**	**980**	**1,058**
% change from previous year	32.6%	2.4%	2.0%	7.9%
U.S.	**5,123**	**5,062**	**5,130**	**5,254**
% change from previous year	0.2%	-1.2%	1.4%	2.4%
Overseas	**2,354**	**2,487**	**2,622**	**2,762**
% change from previous year	6.6%	5.7%	5.4%	5.3%
Total	**14,338**	**14,583**	**15,051**	**15,636**
% change from previous year	5.9%	1.7%	3.2%	3.9%

Source: Ministry of Tourism, Tourism Forecasting Model

1 Forecasted spending does not include spending by Ontarians on Canadian carrier fares for outbound trips